

Final Report of Peer TA Activity #183

Welfare Peer Technical Assistance Network

Georgia EITC/Asset-Building Coalition
Planning Meeting

Macon, Georgia

October 19, 2009

Prepared for:

The Administration for Children and Families

Office of Family Assistance

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I. Welfare Peer Technical Assistance Background

On October 19, 2009, the Welfare Peer Technical Assistance Network (WPTA) offered technical assistance to the Georgia Earned Income Tax Credit (EITC) and Asset-Building Planning Meeting with the primary purpose of bringing together EITC coalitions in the State of Georgia to talk about coming together with other organizations to form a cohesive statewide coalition of organizations and agencies. The Coalition's long term goal is to ultimately work together to implement initiatives in underserved areas.

The technical assistance request was submitted by Laura Lester, the Advocacy and Education Director of Atlanta Community Food Bank (ACFB), which is a nonprofit that currently distributes nearly 2 million pounds of food and other donated grocery items each month to more than 800 nonprofit partner agencies in 38 counties in Metro Atlanta and Northern Georgia. ACFB supports a wide range of people in need, from children to the working poor. Food pantries, community kitchens, childcare centers, night shelters, and senior centers are among the agencies that receive products from the Food Bank and provide food and other critical resources for low-income Georgians who suffer from hunger and food insecurity. The Food Bank also operates several community projects to aid their agencies in community building, technical assistance, and advocacy efforts.

Atlanta Community Food Bank's request was sponsored by Darrel McGhee, Regional TANF Program Manager, and Eric Blanchette, Childcare Program Specialist, from the Department of Health and Human Services, Administration for Children and Families, Atlanta Regional Office. Mr. Blanchette also participated in the coalition as a member.

The technical assistance request was for WPTA to assist in bringing together local EITC coalitions in the State of Georgia to brainstorm ideas about creating a statewide coalition, establishing a plan for the group, and developing initial plans for a broader meeting to be held in spring 2010 to kick-off the statewide group. The coalition planning meeting was held in Macon, Georgia, on October 19, 2009.

II. Welfare Peer Technical Assistance Executive Summary

A. The Earned Income Tax Credit: A Safety Net for Low-Income Families

Widely praised for its success in supporting work and reducing poverty, the Earned Income Tax Credit (EITC) has grown to be one of the most successful and universally acclaimed provisions of U.S. domestic policy. In fact, several expansions in the late 1980s and early 1990s turned the EITC into the largest Federal aid program targeted to the working poor. The EITC provides approximately \$37 billion worth of assistance to almost 21 million low-income working families and is credited with lifting 5 million people out of poverty (please reference footnote 1 below), including 2.7 million children of low-income workers living above the Federal poverty line (please reference footnote 2 below). Research also indicates that the EITC has had a powerful effect on increasing the proportion of single parents who are working (please reference footnote 3 below). In effect, by providing an additional income boost through a tax refund, the EITC truly supplements wages. It is estimated, however, that between 15 and 20 percent of all persons eligible for the EITC do not claim it (please reference footnote 4 below).

1 The National EITC Outreach Partnership, "The Earned Income Tax Credit – A Fact Sheet," July 2004 www.centeronbudget.org/eitc-partnership/eitcfactsheet.htm

2 Berube, A. (June 21, 2004) "Background on EITC Campaigns." Presentation: EITC Funder's Meeting. Brookings Institute. http://www.brookings.edu/metro/speeches/20040621_EITC.pdf.

3 According to the National Bureau of Economic Research, the percentage of single mothers who work rose from 73% in 1984 to approximately 82% in 1996, and that EITC expansions had a stronger effect in increasing workforce participation than welfare policy changes.

4 Welfare Peer Technical Assistance Network. 2006. "Supporting the Working Poor in Creating Long-Term Self-Sufficiency." ICF International, Inc. <http://peerta.acf.hhs.gov/uploadedFiles/EITC%20Newsletter%2Epdf>.

B. Welfare Peer Technical Assistance Outreach

The Welfare Peer Technical Assistance Network helps States collaborate across the country on promising practices in EITC outreach to TANF families. These initiatives have helped States build local community coalitions among State TANF agencies, State Departments of Revenue, community action agencies, and the Internal Revenue Service. These events have helped States start developing EITC outreach campaigns to increase use of the benefit among the low-income population. Through its work on the EITC, the WPTA Network has reached the States of Florida, Georgia, Idaho, Kentucky, Louisiana, Missouri, Oklahoma, Virginia, and West Virginia.

At the Georgia EITC/Asset-Building Planning Meeting, participants were asked to identify the most important goal in forming a statewide coalition. The group identified sharing of resources, collaborating, and networking across the State of Georgia as the most important goal. The participants also discussed reaching rural, underserved, and disability communities; creating a statewide marketing campaign; and increasing access to related services.

This report captures the discussions of the planning meeting participants.

III. Georgia EITC/Asset-Building Planning Meeting Report

A. Participants

The work group consisted of 38 invited members from various organizations serving Georgians, including regional EITC coalitions, administrators from Georgia social service agencies, community action agencies, and the Internal Revenue Service. They came together to brainstorm ways the smaller coalitions could come together with other agencies to form a statewide coalition that better serves Georgia's underserved populations.

B. Presentation by the Center for Financial Independence & Innovation

The Center for Financial Independence & Innovation, Inc. is a nonprofit organization dedicated to helping individuals with disabilities, and their family members to advance their financial independence and security. Jackie Wilks-Weathers, the Center's Executive Director, charged the coalition with bringing people with disabilities into the fold, claiming that the disabled population is extremely underserved when it comes to receiving information on financial resources available to them. She offered to help the coalition develop resources and outreach materials, including flyers in Braille, large print, and special Web sites for those who are visually impaired. She also agreed to review outreach materials intended for disabled individuals to ensure that they are appropriate and non-offensive.

C. Facilitated Planning Session

a. Goals and Potential Partners

The session was facilitated by David Camporeale, Family Assistance Program Specialist, of the Office of Family Assistance, and Louisa Fuller of ICF International, a member of the Welfare Peer Technical Assistance Network Team. Mr. Camporeale asked the work group on Monday morning to identify the goals for a statewide coalition. The work group members identified the following goals:

- Sharing resources, collaborating, and networking across the State of Georgia.
- Reaching rural, underserved, and disability communities with EITC.

- Creating a statewide marketing campaign through a variety of media (public service announcements, Internet, SMS text messaging, radio, etc.).
- Increasing access to related services.
- Creating measurable outcomes.
- IDA-EITC-Assets
 - Homeownership
 - Postsecondary education
 - Small micro-loans, city block grants, and grants to small business owners.
- Locating financial resources.
- Soliciting city and State government support (e.g., Savannah).
- Identifying promising practices that can be duplicated and implemented in rural areas to create consistency throughout the State.
- Raising awareness that resources are available.
- Implementing financial education (including asset development and building wealth) in the school system.
- State EITC opposed to a Federal EITC.
- Increasing access to complementary programs at Volunteer Income Tax Assistance (VITA) Web sites (e.g., Supplemental Nutrition Assistance Program [SNAP]).
- Creating a culture in Georgia that encourages and supports work.
- Creating more one-stop-shops so taxpayers will not leave VITA sites uncertain what to do with their money.
- Making Georgia the best!

After establishing goals for the statewide coalition, the group discussed potential coalition partners. It decided that the best place to start in determining potential partners was social service agencies/organizations that currently serve their target population. The list included:

State/Federal:

- Department of Health (Women Infant and Children (WIC) and Head Start)
- Title 6 Coordinators (public school lunch)
- Chamber of Commerce
- Local Governments
- Family and Child services
 - Temporary Assistance for Needy Families (TANF)
 - Childcare Provider Network
 - Child Support Enforcement
- SNAP
- Department of Health
- Department of Labor
- Georgia Department of Revenue (State tax agency)
- Public Housing Authorities

Community-Based Organizations/Businesses:

- Community Action Agencies
- Goodwill
- Nonprofits and charities
- Food Banks
- Churches and faith-based communities
- Disability community:
 - Adult Rehabilitation Center
 - Independent Living Centers

- The National Federation for the Blind of Georgia
- Hospitals
- Crisis centers, homeless shelters, etc.
- Veterans organizations
- Hispanic organizations, African American organizations (e.g., National Association for the Advancement of Colored People)
- Different clubs
- Local United Way Chapter
- Girls Scouts, Boys and Girls Club, schools, Sunday school (best way to get the message to homes is through the children).
- Different financial organizations (banks, small business, etc.)
- Local retailers, supermarkets, beauticians and barbers, laundromats, realtors, etc.
- Large employers, such as Wal-Mart, could distribute EITC information
- Utility companies could include information about EITC in their mailings
- Temp agencies, careers USA, payroll companies, etc.
- Run ads at movie theaters, put signs on buses (CBS outdoors did this), local papers, post office, YMCA.
- Public libraries
- Family Connections
- American Association of Retired Persons

Others:

- Human Resource Network Group: Society for Human Resource Management (SHRM), which represents a majority of Human Resources professionals who get together monthly. A good way to get the message to the target audience.
- Word of mouth - do we have an individual who can vouch for the program? Different testimonies.
- Partner with local call centers (311, 211) to direct clients to where they can get help.
- English as a Second Language
- General Education Development Programs

b. Structure

The next question Mr. Camporeale posed to the work group was, “Now that you know your targets, how are you going to reach out, and what exactly do you want to do?” This question sparked a dialogue among work group members and concluded with the decision to create a structure for a statewide coalition. They started by giving the structure of some of the established coalitions represented in the work group:

- Savannah
 - Meet monthly
 - All partners run a VITA site and perform EITC work
 - Most coalition members are partners
 - Level structure (no subcommittees).
 - No advisory group
- Atlanta
 - They act as coordinators
 - 100-plus organizations are coalition members
 - Partnership is open to anyone interested in pulling people out of poverty
 - Divided into four work groups:
 - Marketing Work Group- plans to develop a marketing tool kit to distribute to sites for consistency
 - Asset Development Work Group-food stamps

- State EITC Coalition Work Group
- VITA Work Group- looks to scope out potential VITA sites
- Columbus
 - In the past, its structure was really site specific: VITA sites, and coalitions with chairs and co-chairs
 - This year, they want to be more structured
 - Hope to bring everything together into one main site and two satellite sites.
- IRS
 - Three-pronged approach:
 - Asset development
 - Outreach
 - VITA

c. GA4P (Georgians for Prosperity)

Out of this discussion, the work group created GA4P (Georgians for Prosperity), and established a working structure for this statewide coalition. Their mission statement is: “Helping Georgians create economic stability through the expansion of the EITC program, asset development, and education and outreach.” The Group plans to invite all relevant agencies and organizations to participate in the coalition. Responsibilities will be assigned based on the organization’s areas of expertise. For the first year, the work group decided to establish a repository structure. If necessary, a more formal structure will be adopted the following year. In a survey, 66% of the work group said it thinks the coalition should meet quarterly after the June 2010 meeting.

Five work groups were established:

- Work groups:
 - **Statewide Coalition** (may end up being the Steering Committee, and could be responsible for reaching out to rural and other groups)
 - Original goals (listed above)
 - State-level partners
 - Repository
 - Research and raw data on people who are and are not receiving.
 - ❖ One way to capture data on who is in the population, working, etc. to see who is not filling.
 - ❖ Use data to show how much is being left on the table to engage those on the State level.
 - ❖ Do not have to perform research ourselves. We can decide what information we need and get universities, grad programs, etc. to help with the research.
 - Funding
 - This committee potentially could work out the coalition’s mission statement.
 - **Marketing**
 - **Advocacy**
 - **Asset building**
 - **VITA**
- There should also be interest groups within the committees/work groups to discuss the various issues facing each organization that serves different parts of the population (rural and urban).
- A time line needs to be established: What do we want to accomplish? When do we want to accomplish it? How can we fund it?

IV. Next Steps for GA4P

Now that a general framework and structure have been created for the statewide coalition, GA4P, planning can begin for the larger follow-up meeting in June 2010. The larger work group divided into three committees to prepare for the June meeting and to lead the coalition in its first year: Planning, Outreach, and Steering. The planning committee will plan the large meeting in June. The outreach committee will plan teleconferences and share resources and materials. The steering committee, which will include a chair and co-chair, will guide the coalition for the first year until a formal structure is created. A listserv was created for sharing resources between coalition members. It can be accessed through Gavita_subscribe@mail.lawhelp.org. A Web site also will be created for outreach and sharing information. Once this Web site is created, the Welfare Peer TA Network will send out weekly e-mail alerts with information about GA4P and a link to its Web site. Each committee plans to meet within the first month, and the first statewide coalition meeting is planned for early December. The planning committee will contact the Welfare Peer TA team in early January 2010 to begin planning for the meeting in June 2010.

Appendix A: Agenda

**Georgia EITC/Asset-Building Coalition Planning Meeting
October 19, 2009**

United Way of Central Georgia
Peyton Anderson Community Services Center
277 Martin Luther King, Jr., Blvd., Suite 301
Macon, GA 31201

Agenda

MONDAY, OCTOBER 19, 2009

9:30 – 10:00 AM **Continental Breakfast and Registration**

10:00 – 10:30 AM **Welcoming Remarks**

- *Tammie Collins*, Executive Vice President, Community Impact, United Way of Central Georgia, Macon, GA
- *Mikki Betker*, Atlanta Territory Manager, IRS/Wage and Investment/SPEC
- *Teinique Gadson*, Interim Executive Director, Neighborhood Improvement Association, Savannah, GA
- *David Camporeale*, Family Assistance Program Specialist, Office of Family Assistance (OFA)

10:30 – 11:00 AM **Introductions/Ice Breaker**

Participants will introduce themselves to the group, including their role in the meeting, through an Ice Breaker activity.

11:00 AM – 12:00 PM **Facilitated Planning Session**

For the remainder of the day, participants will brainstorm on the topics listed below with the goal of formally establishing the coalition, defining membership, establishing a plan for the group, and developing initial plans for a broader meeting in summer 2010 to kick-off the statewide group.

- Decision to form a coalition
- Who will be in the coalition (open to all interested parties, or by invitation only)? Who do we think must be included? What are the best ways to approach them?
- Name for coalition
- Mission statement
- Leaders for group
- What committees do we want to form?
- How often will we meet? Where (in Macon, or rotate through other areas)? Or by phone?
- How will we address counties who are not being served?
- Goals for first year
- What will this look like if we are successful in one year? Five years?
- Plans for meeting next summer (form group to plan this meeting)

Facilitators: David Camporeale, Family Assistance Program Specialist, OFA, and *Louisa Fuller*, Manager, ICF International, Inc.

12:00 – 12:30 PM **Lunch**

12:30 – 12:40 PM **Presentation by the Center for Financial Independence & Innovation**

Jackie Wilks-Weathers, Executive Director

12:30 – 3:30 PM

Facilitated Planning Session (continued)

The remainder of the day will allow participants to brainstorm on the below topics with the goals of formally establishing their coalition, defining membership, establishing a plan for the group, and developing initial plans for a broader meeting in summer 2010 to kick-off the statewide group.

- Decision to form a coalition
- Who will be in the coalition (open to all interested parties, or by invitation only)? Who do we think must be included? What are the best ways to approach them?
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- Goals for first year
- What will this look like if we are successful in one year? Five years?
- Plans for meeting next summer (form group to plan this meeting)

Facilitators: David Camporeale, Family Assistance Program Specialist, OFA, and Louisa Fuller, Manager, ICF International, Inc.

3:30 PM –4:00 PM

Wrap-Up and Closing Remarks

- *Laura Lester, Director of Advocacy and Education, The Atlanta Community Food Bank*

Logistical Information:

Meeting Location:

United Way of Central Georgia
Peyton Anderson Community Services Center
277 Martin Luther King, Jr., Blvd.
Macon, GA 31201
478-745-4732

Lodging:

Macon Marriott City Center (about ½ mile from United Way office)
240 Coliseum Drive
Macon, GA 31217
478-621-5300

Travel:

The Hartsfield-Jackson Atlanta International Airport is about 1¼ hour from Macon, depending on traffic. Avis, Budget Car Rental, Dollar Rent-A-Car, Enterprise, Hertz, and National/AlamoThrifty Car Rental are located at the Atlanta Airport.

Appendix B: Participants List

**Georgia EITC/Asset-Building Coalition Planning Meeting
October 19, 2009**

United Way of Central Georgia
Peyton Anderson Community Services Center
277 Martin Luther King, Jr., Blvd., Suite 301
Macon, GA 31201

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